



2012

Montana Department of Revenue

Guidelines for Reproducing IRS W-2 & 1099 forms

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1. Overview/Purpose

The purpose of this document procedure is to define the requirements of a computer generated tax form produced by a software developer or payroll provider. If the following guidelines are followed, the Department of Revenue will accept reproductions of official forms with prior approval.

Forms submitted by taxpayers that do not follow these guidelines are subject to be rejected & resubmissions in the correct format will be required.

2. Vendor Identification Number

You are not required to have a Montana Vendor Id, however please print your NACTP Id near the form year or form name.

3. Approval Process

3.1 Submitting Forms

- Prior to submitting forms for approval, please fill out & email the Vendor Registration form to DOR e-Services. When submitting forms, software developers must provide one contact that coordinates development and a list of forms they intend to reproduce.
- Substitute forms will not be accepted or approved until the final version of our official forms has been published on our website. We are using the IRS's final forms.
- Photocopies or faxed submissions are not acceptable
- Forms may be submitted to the Montana DOR using PDF format, via **email or mail**.

Email PDF's: DORE-Services@mt.gov.

Please limit emails to 1 form type per email. Example: 1099 vs 1098 vs W2

The subject line of the email should include the following:

- Company Name (optional)
- Montana Vendor ID or NACTP code (required)
- Form Name

Mail hardcopy paper versions of forms to:

Montana Dept of Revenue
Attn: E-Services Forms Review
340 N Last Chance Gulch
Helena, MT 59601

Please include a cover sheet and separate forms to be easily identified within each package. Please use paperclips to separate forms and do not staple.

3.2 Number of Forms Required for Submission or resubmission

- 1 Full field sample copy of each form (XXX ...or 999...) both are acceptable
- 5 variable data test samples

3.3 Process Once a Form is Submitted for Approval

1. The entire form pack will be reviewed for accuracy of line references compared to the final form provided. Spelling and grammar will not be reviewed by the department.
2. The entire form packet will be review for margin, line entry, spacing requirements, font size, etc
3. The packet will be reviewed to determine how your reproduced forms will perform in our data entry system on a line by line basis.
4. Once reviewed we will email a notification identifying which forms were approved or rejected. If rejected, we will explain the issue & resubmission may be required.

4. Formatting Requirements

4.1 Spacing between Entry Lines

Vertical & horizontal spacing for all W-2's & 1099's must meet spacing requirements as defined on each form posted on our website. These forms are the forms posted on our website.

4.2 Font Size

- Variable data: font & size Courier and Courier New 10 or 12pt
- Static data (form text): discretion of developer, but must appear similar to original form, be neatly organized & easy to read. Recommended sizes are between 6-14pt.
- Ensure that end-users cannot change font size of the data they entered on the forms.

4.3 Margin Requirements

- ½ inch margin is required around the top, bottom, left & right for the forms.

4.4 Data Formatting and Rounding

- FEIN or SSNs
 - must be 9 numeric characters
 - do not mask ID's
- Amounts:
 - Do not round
 - Signs permitted: decimal, dash (to indicate a negative amount)
 - Signs not permitted: dollar sign (\$), comma (,), percent (%)
 - If there are no money amounts being reported, the field name must still be present, however leave the data information blank
- Only 1 enter per field/box allowed

4.5 Paper Size & Printing Requirements

- Refer to final document posted on our website.
- One form per page.
- Software must inform taxpayer to send the originally printed form, not a photocopy, for processing.
- "Shrink to Fit" must be unchecked. "No graphics" must be unchecked.
- Inform taxpayers that black ink should be used & that their ink cartridge should be capable of producing a solid image.

- Taxpayer should not be able to change font style, font size or image size.

4.6 Grade/Color of Paper

- White, unlined paper
- Most paper works with the exception of really thin paper.
- Carbon copies & carbon copy paper are unacceptable

4.7 Color of Ink

- Black ink only
- Boxes defining fields must be reproduced in black ink.

4.8 Shading & Unique Logos

- Fields that are grayed out, can be gray or white.